

eMARS Approvals and Workflow

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Kentucky
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INTRODUCTION

- What have we done?
- What are we doing now?
- What still needs to be done?



eMARS Approvals/Workflow

- What have we done?
 - Collected agency spreadsheets with “default” (department-level) Approval Rules
 - Loaded spreadsheets to UAT environment
 - Collected “central” approvals from the eMARS project team



eMARS Approvals/Workflow

- What are we doing now?
 - Gathering the remainder of “default” spreadsheets not yet submitted by agencies
 - Loading “central” approvals to UAT environment
 - Getting UAT ready for you to test with



eMARS Approvals/Workflow

- What still needs to be done?
 - IF NECESSARY...agencies may create Approval Rules for documents at a level below department (i.e. Division or Group)
 - IF NECESSARY...agencies may assign conditions to some of their approval levels
 - Verify Approval Rules are correctly defined in UAT

eMARS Approvals/Workflow

- Approval Rules below department-level
 - Updated version of F6.12b available with lower-level organizational codes included x
 - You can pick and choose what documents, if any, you want to set up additional Approval Rules for
 - Additional Approval Rules may be defined at the Division or Group Level (based on your needs)
 - Important: If you code to the Group level you must also identify the Division that the Group belongs to

eMARS Approvals/Workflow

- Adding Conditions to Approval Levels
 - New spreadsheet will allow you to add “plain English” conditions to any of your approval levels
 - Examples of conditions:
 - Amount greater than \$10,000
 - Object Code not equal to E361 or E362
 - Program code not null/not blank

eMARS Approvals/Workflow

- Approval Setup table (IWF08)
 - Administration application
 - ALL approval rules in eMARS are found here
 - “Key” to table is document code + all 9 organizational elements



eMARS Approvals/Workflow

- Approval Setup table (IWF08)
 - In UAT the “default” Department-level rules have been loaded for most agencies
 - Approval Rules loaded from F6.12b spreadsheets
 - Self-Approval Restriction
 - Routing Sequence
 - Assignee ID (Approval Role)
 - E-mail flag/indicator



eMARS Approvals/Workflow

- How do I test my Approval Rules in UAT
 - Number of “generic” user ID’s will be set up in UAT
 - ID’s will have access to view Workflow tables in the Administration application
 - ID’s will have access to process documents in the Financial application

eMARS Approvals/Workflow

- How do I test my Approval Rules in UAT
 - Default/Department-level rules
 - For each document subject to workflow there will be a “Template” document in UAT in **Final** status
 - “Template” documents will be entered using the following criteria:
 - **Department = 758**
 - **Unit = UNIT**
 - **ID = WORKFLOW**
 - Locate document on Document Catalog
 - Copy document and enter your Department number; unit code = UNIT; Document ID = “whatever you like”

eMARS Approvals/Workflow

- How do I test my Approval Rules in UAT
 - Default/Department-level rules
 - Click VALIDATE at bottom of document
 - Click SUBMIT to send document through Workflow
 - Status of document is now **PENDING**
 - Action Menu – Click on Approve / Track Work in Progress
 - Verify workflow path is correct
 - Close the document

eMARS Approvals/Workflow

- How do I test my Approval Rules in UAT
 - Approval Rules below Department level
 - Follow same steps used to test “Default” rules, except, you will use Unit codes that pertain to your agency (instead of the default UNIT code)
 - At this time the agency organizational codes have not been populated in UAT
 - Organizational codes will be populated as we receive them from the AILs

eMARS Approvals/Workflow

- The eMARS Project Team will load the additional spreadsheets as we receive them
- You will be notified when your changes/additions are in UAT for you to test
- Process will continue until you have “finalized” your Approval Rules

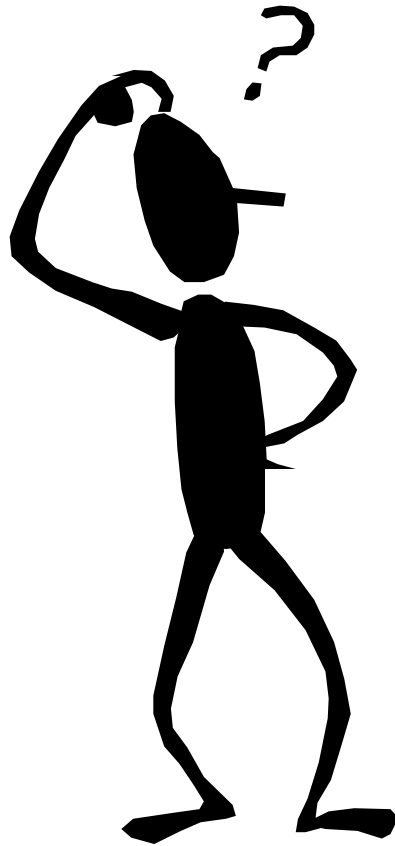


eMARS Approvals/Workflow

Other Talking Points

- This is not intended to be “end-user” training
- UAT is a TEST environment
- Maintain “tunnel vision”
 - Stay focused on identifying and verifying Approval Rules

eMARS Security and Workflow



Questions?